SETTING THE APPOINTMENT

We prefer all decision-makers be present so that there is no second-hand information and all promises/opinions are heard correctly by all parties.

If the caller insists that the other spouse/partner is not involved at all in the decision, set the appointment and talk to the listing agent about it and they will decide if it should be changed.

Any spot open on our calendar is ok to fill in (even 8:30 or 9:00 p.m. or 7:00 a.m.). Never read off our appointments, just mention two (2) alternative times and ask them to pick one. First ask them if it's possible to meet during the day (obviously if they could take off work to meet Charlotte, her children would prefer that than her being away at night). Same thing goes for Janice.

REVISED!!!!!

*****TRY TO MAKE ALL APPOINTMENTS DURING THE DAY. THEY CAN LEAVE A KEY UNDER THE MAT AND CHARLOTTE/JANICE CAN SEE THE HOUSE AND THEN MEET THEM AT THEIR OFFICE DURING LUNCH OR ASK THEM IF THEY CAN MAYBE LEAVE WORK EARLY AND MEET YOU AT 4PM OR SOMETHING LIKE THAT.*

If it's an evening appointment say, "When's the earliest you could meet Charlotte/Janice that night?" If you are having trouble getting them an appointment, then tell them you will call them back after speaking with us. We want them to feel we have time for them and will make time for them.

*Script If They Must Have Pat

"That's fine, what I'm going to do is have Charlotte/Janice/Mike come out first and go over our marketing plan and talk to you about what you need to do to get ready for sale and then after that I'll have Pat come over and go over pricing with you. Is that o.k.?"

Thanks,

Pat, Charlotte, Janice & Mike

LEAD SHEET

Date: _____ Taken By: _____

Name: _____ Spouse's Name: _____

***Owner's Address:** _____

***Address of Property to be Listed:** _____

***Location of CMA appointment: _____

Home Phone: _____ Work Phone: _____ Cell Phone: _____

☐ Buyer Prospect ☐ Seller Prospect Email: _____

What prompted you to call? _____

Had you hear of us prior to that? _____

If television: "What station?" _____

Are you the sole owner of the house? _____

If "No," will the other owner(s) be there? _____
****(We prefer that all owners be present so that all questions arising can be answered with all parties present)*

In order to give us an idea of how much time to block out – if you like everything we have to say; will you be listing your house with us at this appointment? ☐ YES ☐ NO ** If YES, SKIP next question.

Okay, Great! Are you planning on interviewing more than one agent for the job? ☐ YES ☐ NO
_____

Date of Appointment: _____

Time: _____ Appointment with: ☐ **CHARLOTTE** ☐ **PAT** ☐ **JANICE** ☐ **MIKE**_____

For Referrals:

Name of Referring Party: _____
(Ask them to spell the name)

**If the referring party is not in database, get the address so we can send them cookies/brownies.
☐ Was Pat given a FYI "to-do" about the referral?
☐ Were cookies/brownies sent?
☐ Was the referring party added to the "Newsletter" category?

ANSWERS WE NEED

Let me ask you some questions so that we can do a Market Analysis:

- What neighborhood is the house in? _____
- Who built it? _____
- Do you know the name of the model? _____
- Can you tell me the street the exact same builder built on in your neighborhood? _____

GREAT, NOW:

- Approximately how many sq. ft. is your house? _____
- What is the style of your house (i.e. colonial, split level, etc.)? _____
- (If it is a townhouse) Is it an end unit? _____
- How many bedrooms do you have? _____ = UP _____ DOWN _____
- How many bathrooms? Full? _____ Half? _____
- Do you have a fireplace? ☐ YES How many? _____ ☐ NO
- Do you have a garage? ☐ YES How many? _____ ☐ NO
- Do you have a basement? ☐ YES ☐ NO Is it finished? ☐ YES ☐ NO
- Do you have a deck? ☐ YES ☐ NO
- Do you have a fence? ☐ YES ☐ NO
- Do you have a patio? ☐ YES ☐ NO
- What is behind your house? ☐ Open Space ☐ Trees ☐ Another House ☐ A Road ☐ Other _____
- Why are you moving? _____
- Where are you moving to? _____
- How soon will you be moving? ___

ANSWERS WE NEED
(cont.)

- What else can you tell me about your property that would add or subtract value? (i.e.: loft, addition to the house, etc…)

_____

_____

_____

We will run an estimate of your Maryland Closing costs so that you can see what you will net from the sale of your home

- About how much do you owe on your mortgage? $_____

**If seller doesn't know amount, ask them to take a guess. If they can't take a guess, ask them how much they paid for the property and how long ago they bought it and then we can kind of guess from there.*

- Do you any second mortgages or lines of credit? ☐ YES $_____ ☐ NO

**One other thing that we will do is run an active list of your competition, what price did you have in mind for your home?_____

**If they won't answer, please write their response above and say, " Charlotte/Janice/Mike will do a full market analysis and come up with their own assessment of the value, we just like to know what range YOU think it fits into so that we can be fully prepared with the listings that are currently on the market. What RANGE do you think it falls into? _____

- Do you have any children living with you in the home? ____

(If they ask why, tell them we have gifts we would like to give the children when we arrive for the appointment)

O.K., GREAT!

If you could please have a copy of your plat if you have one, a copy of your deed and a key for us at the time of your appointment that would be helpful.

Once the appointment is scheduled, please write the time and last name on the board behind Charlotte, Janice, and Mike in red ink.